



Welcome to the CAB

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What is a CAB



- A body consisting of...
 - Standing and temporary members
 - Who are prepared.
 - Who give due diligence to CAB matters.
 - Who represent a defined point of view.
- ... which gives advice to the Change Manager (CM)
 - Advice focused on the mission of Change Management.
 - Purpose is to discover and find conflicts that affect your area of responsibility, but free to make more general comments.
 - In a working meeting with a definite agenda.

What's a Change?



- Changes to the live technical environment or to certain documents that govern it.
 - Changes needed to sustain service or to provide internal optimizations or corrections. (This is a broad category.)
 - Replacing "broken" things, or things about to become "broken."
 - Placing optimizations into the system.
 - Provisioning within a defined framework.
 - Changes in response to new or evolved customer* requirements.
 - Generated, ultimately, by Service Management.
 - Are approved w.r.t. impact on the live environment.
 - Once approved, the changes to implement and provide the services fall into case 1.

* group who defines and agrees to the Service Level Targets.

Role of Change Management



- Goal is to protect the live environment.
 - Technical environment
 - Documentation environment
- Under ITIL, the roles of Change Management include:
 - Upstream of changes going live:
 - authorize plans to build a change.
 - approve the the release of changes into live environment
 - Downstream of change going live:
 - ensure Post Implementation Review

Types of Normal Changes



- Standard
 - Changes of low risk, with pre-approved templates.
 - Because work is pre-approved, explicit approvals are not needed.
- Minor
 - Changes of low enough risk that the CM can approve without CAB consultation.
 - Possibly requires some ad-hoc consulting.
- Major
 - Changes where risk is high enough that the CM consults the CAB.

High Risk

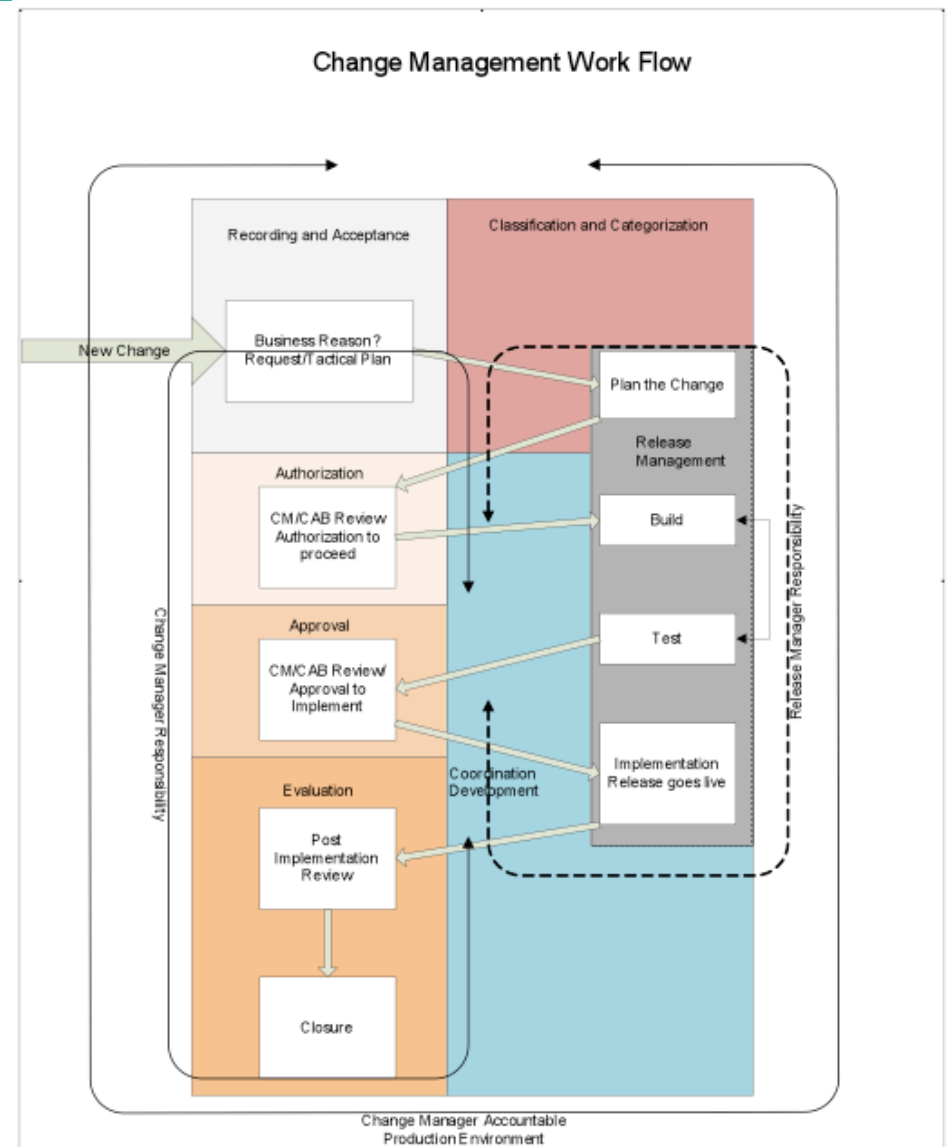


- When a service is on-boarded there's a negotiation with the CM about general level of risk.
 - Changes having high risk are flagged when entered into the system.
- The Change Submitter also fills out a risk screen questionnaire.
 - Risk will be computed from the questions.
- The CM considers these inputs and decides the risk.
 - “low” or “high”

Major Change Processing



- In a major change the CAB advises the CM on granting:
- “permission to build”
 - “permission to go live”



What kind of advice to CM? (1)



- Different kinds of *plans* required for *major* changes.
 - What sort of plans?
 - Plans to construct a release.
 - Plans to put a release in the “live environment.”
 - What makes a change major?
 - High Level of Risk, as determined by Change Management processes.
 - (Minor, standard changes and *work* are not CAB matters.)

What Kind of advice to CM? (2)



- Advice on the *Forward Schedule of Change (FSC)*.
 - The master schedule dealing with “go live” dates.
- Miscellaneous advice, including
 - Advice on (selected) Post Implementation Review (PIR) data
 - Advice on CAB’s own by-laws.
- Notice of changes...
 - in the pipe, which are not, for example, draft RFC’s.
 - which have escaped the process.

CAB Onboarding



- **What can I expect and what is expected of me?**
- An hour of prep and an hour of CAB/week
 - A good part of the CAB agenda is on the web in the remedy tool, accessible by a services account.
- Some critical thinking about process and by-laws.
 - We will learn about the cadence of CAB meetings as we on-board.
- As we mature, the CM will also seek advice about risk assessment. Right now, we only have a heuristic understanding of the risk level that makes a change “major.”

Next



– Demo by Carin.